APPLICATION INSTRUCTIONS

BEFORE YOU APPLY

Explore our Product page (https://canvasannuity.com/#/product) and choose the Canvas Annuity option that is best for you, the Flex Fund or the Future Fund.

- The Future Fund offers the highest rates.
- Flex Fund also offers great rates and allows you to get back your entire premium at any time.

You can purchase a Canvas annuity if you have a business or resident address in one of our licensed states. To find a list of states where Canvas products are currently available, go to our homepage and select the drop-down under "I live in the state of". If you don't see your state, don't worry! We are working hard to make Canvas products available to you soon.

Still have questions? Head over to our Learn page to find more answers: https://canvasannuity.com/#/learn or reach out to our Canvas team: https://canvasannuity.com/#/ meet-our-reps

APPLY

APPLY WITH FAST APP – PAGES 2-4

The Fast App can be completed in less than 10 minutes. Select this option if you are funding your annuity from a checking or savings account using automated clearing house (ACH),

Paper Check, or Wire Transfer. The quickest way to fund your account is by ACH from your checking account. Funds must be available in your bank account today; there are no fees for ACH transactions. If you need to use a savings account, contact your bank to confirm your account is set up to accept this type of transaction.

Before you get started, have your SSN and bank routing and account numbers ready.

APPLY WITH APPLICANT PORTAL- PAGE 4-6

The Applicant Portal provides you with an agent assisted application process. Select this option if you are planning to fund with an existing annuity or life policy, IRA, 401k or similar account. Also choose this option to purchase for non-natural owners such as Trusts, Corporations, and Charities, inherited annuities, or any other unique purchasing scenario.

For rollovers or transfers, you will need to have your existing account information on hand.

Florida residents can apply using the applicant portal, funding options are rollover or transfer, ACH, a paper check, or wire transfer.

APPLYING WITH FAST APP

START YOUR APPLICATION

Enter your name and email address. We value our clients and will never spam your inbox!

Select the state where you have a business or resident address.

PRODUCT

Choose the Fund and term that is best for your needs. Then, enter the amount (premium) you would like to fund your annuity with.

The minimum for the Flex Fund is $5,000 and the minimum for the Future Fund is $2,500.

NEEDS REVIEW

Purchasing an annuity should support your insurance needs and assist you in meeting financial goals. This process is designed to help you decide whether a Canvas annuity is the right fit for you.

OWNER INFORMATION

Canvas products are currently only available to U.S. Citizens or Resident Aliens, so we need your social security number or green card number.

Once you submit your information, we have partnered with Nexus Lexus to verify your identity. This helps protect both of us from fraud.

Simply answer the questions that pop up to continue your application.

ANNUITANT

Most people name themselves as the annuitant, however you may name someone else. You can change the annuitant any time prior to annuitizing your contract by calling customer service.

If you choose someone other than yourself, you will need to enter that person's full name, address, email, phone number, birthday, and social security number or green card number.

BENEFICIARY

The beneficiary will receive the accumulation value of your annuity should you pass away while your contract is in force.

- Please name at least one beneficiary for your contract.
- You may designate up to five different beneficiaries during the application.
- Enter as much information as you have, including their full name, birthday, address, email, phone number, and social security number or green card.
- You must designate the percentage of ownership in order to move on with the application. If you only have one beneficiary, use 100%.

FUND YOUR POLICY

Please note that policies are typically issued within 1-2 business days once your funds are received.

AUTOMATED CLEARING HOUSE (ACH)

Fund your account quickly and securely. There are no fees and checking accounts are preferred for ACH transactions. If you need to use a savings account, contact your bank to confirm your account is set up to accept this type of transaction. Please make sure you have funds available in your bank account today to complete the transaction.

PAPER CHECK

You can mail in a check to our processing center. Include your application ID on your check. Applications will remain open for 30 days after signature. If a check is not received in that time frame you will need to complete a new application.

- The mailing address for check payments is:
  - Puritan Life Insurance Company of America PO Box 81853 Lincoln, NE 68501.
- For an overnight/expedited check, the physical address is:
  - Puritan Life Insurance Company of America 777 Research Dr. Lincoln, NE 68521.

WIRE TRANSFER

You can wire funds directly to our processing center. Include your application ID in the reference section. Applications will remain open for 30 days after signature. If a check is not received in that time frame you will need to complete a new application. Wire transfers sent by 4:30 CT are typically processed the same day.

Wire Instructions:

- Recipient Name: Puritan Life Insurance Company
- Recipient Bank and Address: Wells Fargo Bank, N.A. 420 Montgomery San Francisco, CA 94104
- Domestic Wire Routing Transit Number (RTN/ABA): 121000248
- Account Number: 4045695996
- CHIPS Participant: 0407
- Puritan's Home Office Address: 7272 E. Indian School Rd. Suite 100, Scottsdale, AZ 85251

REVIEW & SIGN

You will be routed to DocuSign, where you can sign your application digitally; this is a simple and secure process. If you have any questions while you're signing, please call (888) 970-970-3556 and one of our licensed, non-commissioned agents can help you. Double check that all your information is correct, sign and click "Finish".

APPLYING WITH APPLICANT PORTAL

START YOUR APPLICATION

For an entity owned annuity, Florida applicants, or funds from an IRA, 401k or similar account, you will need to register for access to our applicant portal. You will be assisted by our licensed agents throughout the process. If you have any questions, you can chat with us or call us at 888-970- 3556.

If you already have an account, you can simply Log in to access your account and start a new application.

PRODUCT

Choose the Fund and term that is best for your needs. Then, enter the amount (premium) you would like to fund your annuity with.

If you're funding your account with a rollover or transfer, this amount does not need to be exact. The minimum for the Flex Fund is $5,000 and the minimum for the Future Fund is $2,500.

APPLICATION TYPE

Choose the type of funds you are using to fund this new Canvas policy along with if you currently have existing life insurance or annuity contracts. We will also need to know who the owner of the new Canvas policy will be (self-owned, entity owned, or inherited) and if there is a joint owner.

ANNUITANT

Most people name themselves as the annuitant, however you may name someone else. You can change the annuitant any time prior to annuitizing your contract by calling customer service.

If you choose someone other than yourself, you will need to enter that person's full name, address, email, phone number, birthday, and social security number or green card number.

BENEFICIARY

The beneficiary will receive the accumulation value of your annuity should you pass away while your contract is in force.

- Please name at least one beneficiary for your contract.
- You may designate up to five different beneficiaries during the application.
- Enter as much information as you have, including their full name, birthday, address, email, phone number, and social security number or green card.
- You must designate the percentage of ownership in order to move on with the application. If you only have one beneficiary, use 100%.

FUND YOUR POLICY

Please note that policies are typically issued within 1-2 business days once your funds are received.

ROLLOVER OR TRANSFER

Fund your account with an existing annuity or life policy, IRA, 401k or similar account. You will need to have your existing contract information on hand. If you are funding using a rollover or transfer, you will be presented with an existing contract form, this form will need to be filled out for each source of funds coming from a rollover or transfer.

AUTOMATED CLEARING HOUSE (ACH)

Fund your account quickly and securely. There are no fees and checking accounts are preferred for ACH transactions. If you need to use a savings account, contact your bank to confirm your account is set up to accept this type of transaction. Please make sure you have funds available in your bank account today to complete the transaction.

PAPER CHECK

You can mail in a check to our processing center. Include your application ID on your check. Applications will remain open for 30 days after signature. If a check is not received in that time frame you will need to complete a new application.

- The mailing address for check payments is: PO Box 81853 Lincoln, NE 68501.
- For an overnight check, the physical address is: 777 Research Drive Lincoln, NE 68521.

WIRE TRANSFER

You can wire funds directly to our processing center. Include your application ID in the reference section. Applications will remain open for 30 days after signature. If a check is not received in that time frame you will need to complete a new application. Wire transfers sent by 4:30 CT are typically processed the same day.

Wire Instructions:

- Recipient Name: Puritan Life Insurance Company
- Recipient Bank and Address: Wells Fargo Bank, N.A. 420 Montgomery San Francisco, CA 94104
- Domestic Wire Routing Transit Number (RTN/ABA): 121000248
- Account Number: 4045695996
- CHIPS Participant: 0407
- Puritan's Home Office Address: 7272 E. Indian School Rd. Suite 100, Scottsdale, AZ 85251

COMPLETE TASKS

One of our agents will work with you and assign the remaining documents for you to complete your application. This will be done completely online through our secure applicant portal.

AFTER YOU APPLY

REGISTER YOUR ACCOUNT

Once you have finished your application, you will be invited to register for your customer portal account. This is where you can view your policy status and issue packet. If you decide not to register at this time, you will be given another opportunity to register once your policy is issued.

If you complete your application using our secure online Canvas application dashboard, you will still need to register for your customer portal account.

LEAVE US A REVIEW

We love to hear from our Canvas Annuity customers. https://www.trustpilot.com/review/canvasannuity.com

ISSUE YOUR POLICY

Canvas will send your application to the insurance company for processing. ACH payments are typically received by the insurance company within 3 business days.

Once the insurance company receives the funds and approves your application, they will issue your policy and you will be notified that your policy documents are available to be viewed on your customer portal account. This email is usually sent to you within 3-5 business days after you apply. If you have not registered for an account, you will be able to do so at this time. If your application is not approved, the insurance company will return your funds.

30-DAY FREE LOOK PERIOD

The email we send to you letting you know your policy documents are available also begins your 30-day free look period.

WATCH YOUR MONEY GROW

You can log in to your Canvas Customer Portal anytime to watch your balance grow and to make changes to your account.

GET YOUR MONEY

At the end of whatever contract term you've chosen, you will have several options for what to do next. Most people choose to either renew their contract or take their money, (principal + interest) back in a lump sum. You can also annuitize your contract, meaning you can choose to receive periodic payments for a specific period of time or for the rest of your life.

AND REMEMBER – if you have any questions while you are completing your application, just type in the chat box online, or give us a call at (888) 970-3556. We're here to help!

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